

Technology Based Conferencing Services Request for Offer - DIR-SDD-TMP-201 Vendor Conference

**Pre-Bid Conference
June 25, 2013**

Welcome

- **Welcome**

- **Housekeeping**

- Phones on mute/webinar in listen only mode

- **Questions**

- Please save until end
- We will collect note cards and take a break to review
- We will reconvene and answer

Written Questions and Official Answers

Vendor and Webinar participants are encouraged to submit all questions regarding this RFO by e-mail or in writing to the Point of Contact listed in Section 3.1 as stated in the RFO. Although DIR may provide tentative responses to questions submitted during the conference, responses are not official until they are posted as an addendum to this RFO, requisition number DIR-SDD-TMP-201, on the Electronic State Business Daily, <http://esbd.cpa.state.tx.us/>. Questions will be accepted until **3:00 pm CT on July 1, 2013**.

DIR Conference Speakers

Denny Ross

Manager

Procurement Services
Technology Sourcing Office

Shannon Kelley

Contract Manager

Enterprise Contract
Management, Technology
Sourcing Office

Carrie Cooper

Purchasing Manager

Procurement Services
Technology Sourcing Office

Delia Arellano

Speaking for the HUB Coordinator

Vendor and Contract
Management,
Technology Sourcing Office

Agenda

- **Welcome**
- **Written Questions and Answers**
- **General Information**
- **RFO Timeline**
- **RFO Overview**
- **HUB Plan**
- **Bid Packages**
- **Break**
- **Questions and Answers**
- **Conference Closing**

General Information

- **Point of Contact for all inquiries regarding this RFO**

- All communications regarding the RFO must be addressed in writing to

Carrie Cooper	
Dept. of Information Resources 300 W. 15th St., Ste. 1300 Austin, TX 78701	Phone: (512) 936-2353 Fax: (512) 936-6896 Email: carrie.cooper@dir.texas.gov

- **Refer to RFO Section 3.1 regarding observance of this requirement.**

General Information *(continued)*

• Disqualification of Offers

- Failure to sign Executed Offer Form
- Failure to complete Financial Information
- Must submit on or before due date and time
- **NOTE:** HUB Form will no longer be pass/fail. We will address deficiencies during negotiations.

• Contact with DIR Personnel

- Vendors and all vendor representatives shall not attempt to discuss the contents of this RFO with any employees or representatives of DIR other than designated contacts. Failure to observe this restriction may result in disqualification of any related Response.

• Packaging of Offers

- Care must be taken to provide offers as outlined in Section 3.7
- NOTE: DIR is now requiring additional copies to be provided on thumb drives instead of paper. Each drive must be labeled per requirements.

RFO Schedule

Date/Time	Activity
June 13, 2013	Publish RFO on Electronic State Business Daily (ESBD)
June 25, 2013, 2:00 pm	Vendor Conference
July 1, 2013, 3:00 pm	Deadline for submitting questions
July 11, 2013, 5:00 pm	Deadline for answering questions
July 23, 2013, 2:00 pm	Deadline for submitting Responses to RFO
July 23, 2013, 2:00 pm	Deadline for DIR to receive vendor references
July 24, 2013 until completion	Evaluation of responses, negotiation and contract execution

RFO Overview

• Section 1.1 - Purpose

- DIR intends to contract to provide Technology Based Conferencing Services, including audio conferencing services, video conferencing services, web conferencing services, and webcasting. **This RFO is for service only. No hardware or software products may be sold through a contract resulting from this RFO. Any products needed to deliver final services must be procured through another contract vehicle.**
- As part of DIR's initiatives to identify strategic sourcing opportunities, DIR reserves the right to make a single award or multiple awards as determined by DIR to achieve the highest overall value to the state.
- This RFO will result in master contract(s) for use by eligible customers who will determine the scope of work based on their business needs. This RFO is not for a specific technology based conferencing project.

RFO Overview – Cost Recovery Fee

- **Section 1.2.3 – Cost Recovery Fee**
- DIR's telecommunications program is a cost recovery program. DIR, in its discretion, formulates cost recovery fees (CRF) per Service designed to fulfill its program needs, as authorized in Chapter 2170, Texas Government Code.
- The CRF to be used for the purposes of this RFO is two percent (2%).

RFO Overview - Exclusions

• Section 2 - Exclusions

Any service awarded under the TEX-AN Next Generation Procurement, RFO number DIR-TEX-AN-NG-001, is excluded from this RFO. The following services were awarded under the TEX-AN Next Generation Procurement:

Long Distance Services	Internet Services (including SOHO)	Fixed Satellite	Voice over Internet Protocol (VoIP)
Local Voice Service	Wireless Service	Access and Transport	

DIR reserves the right to include or exclude in a resulting Contract any services offered in a Vendor's response.

RFO Overview – Form of Contract

• Section 2.2 – Form of Contract

- Item 16 in Appendix A of the RFO allows Vendors to note any exceptions they take to the contract and the standard terms and conditions
- **HOWEVER**: The number and significance of exceptions requested may negatively impact your overall vendor evaluation score
- Acceptance of standard terms and conditions are 15 percent of the total evaluation score
- These may also be considered when prioritizing contract negotiations

RFO Overview

References – RFO Section 3.7.4/Bid Package 5

- Vendor must complete the top half of the form.
- The vendor must provide the vendor reference questionnaire directly to three companies/government agencies.
- The vendor reference must complete the remainder of the form as required and return the form directly to DIR via email per instructions.
- Forms submitted directly by the **vendor** to DIR will receive a score of zero.
- **References due to DIR on July 23, 2013 at 2:00 pm.**

RFO Overview - Evaluation Criteria

- **Financial Review – Pass/Fail**

- The financial review requires the submission of a DUNs number.
- Failure to provide this information will result in your response being disqualified.
- The financial review is a pass/fail determination that is final.
- Only proposals which pass the financial review will continue to the evaluation phase.

RFO Overview - Evaluation Criteria – *(continued)*

- **Evaluation Criteria**

- 40% - Pricing (*Bid Package 2*)
- 35% - Vendor's plan for supporting the Contract and Vendor's history and experience in providing services requested. (*Appendix A & B*)
- 15% - Acceptance of standard contract terms and conditions (refer to Section 2.2)
- 10% - Vendor's Customer references. (*Bid Package 5*)

RFO Overview - Appendices

- **Appendix A of the RFO**

- Detailed history of your company
- Questions 10-14 request sales information for “services **requested in this RFO**”
 - ▶ If you do not provide this information for whatever reason, it will negatively impact your score

- **Appendix B of the RFO**

- Opportunity for you to show how your company is capable of marketing and supporting any contract resulting from this RFO

HUB Subcontracting Plan

- **DIR encourages all respondents to seek Historically Underutilized Business (HUB) subcontractors and maximize HUB participation in their bids.**
 - All respondents, **HUBs and Non-HUBs**, are required to submit a completed HSP
 - The HSP form includes specific instructions for meeting the Good Faith Effort requirements
 - Refer to your provided HUB Subcontracting Plan Checklist (provided in bid package 1, appendix C of the RFO).
 - You may contact DIR's HUB Coordinator for assistance in completing the HSP

HUB Subcontracting Plan *(continued)*

- If you are subcontracting, notification of subcontracting opportunity must be performed.
 - Provide **written** notification of subcontracting opportunity listed to at least three State of Texas HUBs
 - Provide written notification of subcontracting opportunity to a minority or women's trade organization or development center
 - Allow no less than seven (7) working days from their receipt of notice for HUBs to respond
 - **Note:** Attach supporting documentation (letters, fax transmittals, email, etc.) demonstrating evidence of the good faith effort performed

HUB Subcontracting Plan *(continued)*

- **If not subcontracting, your response must contain an explanation demonstrating *how* your company will fulfill the entire contract with its own resources**
 - Self-Performance Justification
- **Alternative to the Good Faith Effort**
 - State of Texas Mentor Protégé Program
 - ▶ Protégé must be a State of Texas HUB
 - ▶ Approval process is no less than two weeks
 - ▶ Contact DIR's HUB Coordinator

HUB Contact

- You may contact DIR's HUB Coordinator for assistance in completing your HUB Subcontracting Plan (HSP)

Lisa Maldonado

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What is Electronic and Information Resources(EIR) accessibility and why is it important ?

- EIR accessibility means that people with disabilities can perceive, understand, navigate, and interact with the electronic information resources. It addresses all conditions that affect access to EIR including visual, auditory, physical, speech, cognitive, and neurological disabilities. EIR accessibility also benefits others, including older people with changing abilities caused by aging.
- Access to information and learning is essential for all people, and we have a responsibility to ensure that people's ability to participate in the information age is not limited by a disability.
- State agencies are required by Govt. Code 2054.451 et. seq. to make their electronic information technology accessible to ensure comparable access to state programs and services for all Texans

Accessibility Regulations

There are IT accessibility laws and regulations in

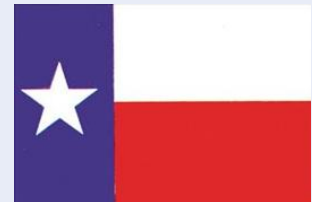
- Various countries around the world
- US federal procurement regulations (Section 508)
- Many US states

Most cite accessibility technical standards

- US Section 508
- ISO/IEC 40500:2012 (aka WCAG 2.0)

Texas statutes and rules

- Apply to all Texas state agencies and institutions of higher education
 - Texas Government Code
 - ▶ [2054 Subchapter M](#)
 - Texas Administrative Codes
 - ▶ [1 TAC 206: State Websites](#)
 - ▶ [1 TAC 213: Electronic & Information Resources](#)



EIR Accessibility in DIR's Cooperative Contracts

DIR ensures that

- Vendor bid responses include accessibility documentation ([Voluntary Product Accessibility Templates or VPATs](#))
- VPATs are evaluated for completeness and high level accuracy (credibility)
- Links to VPATs are available from the vendor's DIR contract web page (once awarded)

What is a VPAT?

- A standardized template used in the industry to document accessibility conformance to US Section 508
- A vendor-generated, product-specific document using the [VPAT template](#) that provides relevant and specific information about compliance with Section 508 Standards
- Helps procurement and contracting officials make preliminary assessments of the degree of accessibility compliance in a vendor's EIR
- Allows procurement staff and others to evaluate accessibility compliance consistently across multiple vendors

Where EIR Accessibility in Procurement Applies

EIR Procurement Type	Examples	EIR Accessibility Required
Direct use of EIR	<ul style="list-style-type: none"> • software used on agency public facing websites. • software used by employees in the performance of their work. • copy machines that will be used by agency employees. • services to develop websites used by employees or the public. • externally hosted websites or services used by the public or agency employees. 	Yes
Direct but insignificant use of EIR	<ul style="list-style-type: none"> • specific software with no administrative or public user interface. 	Maybe
Indirect use of EIR	<ul style="list-style-type: none"> • human resources services delivered through a website or telephone system. • wellness services that may be delivered through social media such as Facebook pages or through Web-based multimedia or videos. • training or technical support that may be delivered through electronic handbooks, forms, or through a Web-based or telephone information system. • transaction services that may require the public to interact with EIR through interoperable controls, video screens, menus, or websites as in the use of a debit card reader or ticket kiosk. 	Maybe
Non-EIR	Purchase of food, office supplies, and other staples	No

FAQ's for Suppliers

How does EIR accessibility affect my ability to compete for DIR contracts?

- Because EIR Accessibility is required in Texas rule, accessibility information (VPATs) may be used by DIR customers as criteria in product / service selection.

What documentation of EIR accessibility will I be required to submit in the bid responses?

- As part of the solicitation process, suppliers are asked to provide documentation of the accessibility for all applicable products / services included their bid this documentation in the form of Voluntary Product Accessibility Templates (VPATs).

How do I obtain a VPAT for each applicable product in a bid response?

- If you are a vendor responsible for the development and production of products included in the bid response, you should complete the applicable sections of the VPAT based on accessibility testing evaluations. Information on various automated and manual accessibility testing tools and techniques can be found on [the “Tools and Resources” pages of DIR’s EIR Accessibility website](#) .
- If you are a reseller of another company's products / services, VPATs for these offerings should be obtained from the manufacturers.

FAQ's for Suppliers(cont.)

What if the product does not fully comply with EIR accessibility requirements?

- The degree of accessibility compliance for each applicable criterion should be documented in the "Supporting Features" and "Remarks" sections of the VPAT.

How is EIR accessibility managed once inclusion in DIR's Cooperative Contracts has been signed?

- DIR customers will consider the VPAT information when evaluating vendor products for purchase. In some cases, customers may perform their own accessibility testing to validate the VPAT information or may request additional information from the vendor.
- Links to VPAT s for applicable products included in the contract must be posted on the main page of the vendor's DIR specific web page(s).
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Where can I find more general information about EIR accessibility?

- Additional information on accessibility and accessibility resources can be found on [DIR's EIR Accessibility Website](#) or through other resources available on the World Wide Web.

Bid Packages

- **Bid Package 2 – Services Pricing**
- **Bid Package 5 – Vendor References**

Questions and Answers

- **After a brief recess, we will reconvene and answer your questions.**
- **Answers we provide today are unofficial until posted on the ESBD.**
- **If you have an informal question that you do not need to have published, you are welcome to raise your hand and ask that question after the break. You do not need to submit it in writing.**

Conference Recap/Closing

- All questions, inquiries, etc. should only be directed to Carrie Cooper
- Answers to the questions are not final until posted
- Deadline for submitting questions: July 1, 2013, 3:00 pm CT
- Visit the ESBD frequently
- References are due July 23, 2013, 2:00 p.m. CT
- Responses are due July 23, 2013, 2:00 p.m. CT
- Contact Information

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